

CURRICULUM VITAE





Marvey Sihardo Panggabean, S.Sos, CNNLP, CFP®, AEPP®, QWP®


Experienced in Sales Training, Business Development & Leadership Training in Insurance Industry since 2008

- Born : Jakarta 09 March 1978
- College : Universitas Katolik Indonesia Atma Jaya
- Mobile Phone : 08111101848
- Email : marvey1978@gmail.com

LICENSES & CERTIFICATIONS

 Qualified Wealth Planner (QWP) OneShieldt Financial Independence Issued Sep 2023	 Certified Financial Planner (CFP) FPSB Indonesia Issued Mar 2022	 Certified Neo Neuro Linguistic Programming WellDoneSkills Issued Sep 2024 Skills: Neuro-Linguistic Programming (NLP)
 The 7 Habits of Effective People Dunamis Issued Sep 2023 Skills: Self-Management · Coaching · Leader	 Basic Sharia Insurance Islamic Insurance Society Issued Nov 2021	
	 Associate Estate Planning Practitioner (AEPP) LN Consulting Issued May 2021	

WORKING EXPERIENCES

 **Agency & Bancassurance - Sales Trainer - Allianz Sales Academy (ASA)**
Allianz Indonesia - Full-time
Jun 2019 - Present - 5 yrs 6 mos
Jakarta - Hybrid

1. Deliver and Conduct Training in level Basic, Intermediate and Advance Class in previously in Agency area and now in Bancassurance area
2. Create, revise and collaborate Training Material
3. Conduct Training Mandatory Class for sales person previously in Agency area and now in Bancassurance area
4. Conduct Sales Development Class for sales person previously in Agency area and now in Bancassurance area and also for Bank Staff
5. Involve in Project Training Road Map dan Training Material Development in Agency & Bancassurance
6. Conduct Leadership Training level Basic and Intermediate for leaders in Agency area
7. Conduct SOL (School of Leadership) Leadership Program for Sales Leaders Bancassurance

 **ADC Training & Development Manager**
PT AJ SEQUIS FINANCIAL
Nov 2018 - Feb 2019 - 4 mos
Sequis Center Jakarta

Job Description :

1. Conduct Basic Training for new EBC / EBO in EBB departement
2. Creating Road Map and Training Material for EBB Training program
3. Conduct regular Product Refreshment Training to sales team
4. Conduct regular Soft Skill Training to sales team (EBC/EBO)
5. Giving update about product information and T&C byweekly blast email to sales team.
6. Support and manage event for sales team and also for departement
7. Also supporting Partnership Distribution Channel for training & event

 **Training Material Development for Bancassurance Specialist (BAS)**
BNI Life
Apr 2018 - Oct 2018 - 7 mos
Jakarta

- Create / Revise Training Road Map
- Create / Revise Training Material
- Create / Revise Sales Tools
- Conduct Basic Training for BAS (Bancassurance Specialist)
- Conduct Refreshment Class for BAS (Bancassurance Specialist)
- Processing and analyzing Training Material Report and document
- Maintain E-Learning by application Edmodo and Create Evaluation Training by using Google Form

 **Manager - Agency Development Manager (ADM) - Agency Coach**
PT. Asuransi Jiwa Sequis Life
Aug 2016 - Aug 2017 - 1 yr 1 mo
Greater Jakarta Area, Indonesia

Job Description:

- Develop Agency Team to increase and achieve their goals per month on: Active Agent, Number of Policy, FYA (First Year Annualized Premium), New Hire (New Recruit)
- Make sure Branch Routine (General Meeting & Leaders Meeting) run well
- Monitoring Production Numbers
- One on One regularly with Branch Manager
- Create Activity and Training Class to support Contest and Production result
- Actively involved in Selling Seminar event and Recruitment Seminar (Business Opportunity Sequis)

 **Manager - Agency Training & Recruitment (General Insurance)**
Zurich Insurance Company Ltd
Jan 2016 - Apr 2016 - 4 mos
Indonesia

Job Description:

- Create Training Road Map for Agency Training (Basic / Intermediate / Advance)
- Create Training Materials (Presentation slide) for Induction Training, Basic Training, Selling Skill Training & Product Training
- Conduct Training Induction, Basic Training, Product Training and Selling Skill Training
- Do evaluation and also Administration for Training Process
- Create Recruitment Strategy for Agency and Create Presentation slide for Recruitment seminar
- Conduct Presentation for Recruitment Seminar

 **Manager - Product Specialist Academic Center & Branch Development Manager (BDM)**
Manulife
Jan 2014 - Jan 2016 - 2 yrs 1 mo
Sampoerna Strategic Square 11th floor Jl Jend Sudirman


1. BRANCH DEVELOPMENT MANAGER / BDM (04 JANUARI 2014 - MEI 2015) - MANAGER LEVEL
Job Description:

- Conduct Basic Training (ITC) and Follow Up (FUITC) Training to New Recruited Agent
- Create and Conduct Open Class base on TNA and what agent needs
- Monitoring Sales and Recruitment Result from Agency Area
- Create Training Material for Sales Idea to sell product
- Support Agency Event (Kick Off, Product Launching, Agency Award etc)
- Support Client Gathering as a Product Presenter
- Giving Coach to agent and also to agency leaders

2. PRODUCT SPECIALIST - ACADEMIC TRAINER (JUNI 2015 UNTIL 04 JAN 2016) - MANAGER LEVEL


Job Description:

- Create Training Material for Product especially New Product Launch
- Support all trainers with update information about product and answer trainer's question about product
- Create Sales Tools for Product Information (example: i was create Product Dictionary based on power point with hyperlink that can easily opened on HP and also Tab.
- Conduct Basic Training (ITC) and Follow Up Training (FU ITC) to New Recruited Agent
- Conduct Open Class specially on Product Discussion and how to sell.
- Conduct TTT (Train The Trainers) for New Product and others project that connected with products
- Create Training Materials and Sales Tools about Product for Project Manulife Xtra Ordinary (MXO) that started

 **Asst Manager - Bancassurance Trainer - ADC (Alternative Distribution Channel)**
Department
PT Sun Life Financial Indonesia
Oct 2012 - Dec 2013 - 1 yr 3 mos
Gedung WTC Jl Jend Sudirman

Job Description:

- Single Fighter as a Bancassurance Trainer to cover all activity in Indonesia
- Creating The Training Roadmap & also Training Material for in-branch (Bancassurance Training) and also for worksite project (Bancassurance Division)
- Deliver & conduct training to Insurance Specialist (Tutorial AAJI, Basic Training & Softskill Training)
- Conduct Training to Bank staff (Branch Manager, RM, PBO and CS) from Bank Partner (Bank Mutiara)
- Conduct Customer Gathering for Bank Partner customer in Jakarta and their branches all around Indonesia
- Make report and evaluation about the training process and the impact to Sales Production.

 **Asst Manager - Regional Trainer (RT) - Bancassurance Trainer & Relationship Manager (RM)**
Manulife
Sep 2011 - Sep 2012 - 1 yr 1 mo
Sampoerna Strategic Square

1. RELATIONSHIP MANAGER (RM) - Asst Manager (since September 04, 2011 to March 31, 2012)

Job Description:

Handling sales of Primajaga, Traditional Insurance Product form Manulife in Danamon. Create Training Materials for Primajaga and conduct training to Danamon's Bank Staff and also monitoring their sales and also conduct Training in Jakarta and all around Danamon branches.

2. REGIONAL TRAINER (RT) - Assistant Manager (since April 01, 2012 until Sept 22, 2012)

Job Description:

- Conduct training and create training material for Financial Specialist from Manulife, Sales Leader dan also Bank Staff of Danamon (Branch Manager, PBO and also Customer Service).
- My self also participated on creating Training Materials for project PB (Bancassurance) Manulife Indonesia with Bank Danamon that started on July 2012.

 **Asst Manager - Agency Trainer & Bancassurance Trainer**
PT Great Eastern Life Indonesia
Dec 2010 - Aug 2011 - 9 mos
Gedung Menara Karya Kuningan

Job Description :

Create Training Material for every product in Agency and also Bancassurance division (Tradisional Life Insurance and Unit Link Products) and conduct training for agency and bancassurance division (Conduct training for OCBC NISP Bank's Staff) in Jakarta and also out of town (OCBC NISP Branches).